

WORLD AGRICULTURAL PRODUCTION AND TRADE

Statistical Report

SEPTEMBER 1975.

WORLD SUMMARIES

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LARGE 1975 WORLD TEA CROP EXPECTED; SUPPLY AND DEMAND IN CLOSE BALANCE

World tea production (excluding the People's Republic of China) in 1975 is expected to approximate the record 1974 harvest of 1.26 million metric tons. Asia and Oceania production are estimated to be up slightly that of over a year earlier to 1.08 million tons, and little change is forecast for the African crop, which is expected to near 150,000 tons. However, a record crop is forecast for South America, reflecting prospects of a good Argentine harvest.

The world supply-demand position for tea will likely continue to be in close balance in 1975. Tea consumption could be given a boost because of higher coffee prices, which may cause some consumers to switch to tea and cocoa.

London auction prices for all teas during 1974 averaged 59.9 pence per kilogram (about 64 US cents/lb.), up 38 percent over the 1973 average of 43.4 pence (about 46 US cents/lb.) Prices during 1975 have continued to remain at relatively high levels. The sharp upturn in tea prices last year was attributed to worldwide inflation, the international monetary situation, higher petroleum costs that triggered increased production and transportation expenses, and lower production in Sri Lanka and East Africa.

Preliminary data show that producer export earnings from tea in 1974 totaled a record \$635 million, up 16 percent over 1973 earnings of \$548 million. Export earnings in 1975 should again be at high levels. However,

the higher revenues will likely be negated by increased costs of fertilizer, petroleum, and imported items from industrial nations.

U.S. tea imports during January-July 1975 totaled 41,835 tons valued at \$52.5 million, off 22 percent in volume from 53,480 tons valued at \$49 million during the corresponding 1974 period. Total U.S. tea imports during 1974 were a record 80,846 tons valued at \$79.3 million.

Because of less favorable weather conditions, Indian production is expected to be below the record 1974 harvest of 492,100 tons. Harvesting for the first half of 1975 has amounted to only 148,400 tons, off 7 percent from the similar 1974 period when production totaled 160,200. India's tea exports in 1974 totaled 205,909 tons valued at \$252 million, compared with 1973 shipments of 188,192 tons valued at \$190 million.

Production in Sri Lanka is forecast at 210,000 tons, up about 3 percent over the small 1973 harvest of 204,000. Production during the first 5 months of 1975 totaled 101,653 tons, compared with 91,041 tons during the corresponding 1974 months. Sri Lanka's tea exports in 1974 totaled only 175,154 tons, off 15 percent from 1973 exports of 205,515.

Kenya's crop is expected to be near the record 1973 harvest of 56,600 tons. Exports of tea from Kenya in 1974 amounted to 49,648 tons, down slightly from the record 1973 shipments of 51,472.

TEA: PRODUCTION IN SPECIFIED MAJOR PRODUCING COUNTRIES,
AVERAGE 1965-69, ANNUAL 1970 to 1975

(In thousands of metric tons)

Continent and country	Average 1965-69	1970	1971	1972	1973	1974	Forecast 1975
Asia and Oceania:							
Bangladesh 1/.....	28.5	31.4	12.5	23.8	27.6	31.8	30.0
India	384.6	418.5	435.5	456.0	472.0	492.1	480.0
Indonesia	40.1	44.0	48.2	49.8	54.5	51.0	55.0
Iran	18.3	16.0	24.0	39.0	41.0	41.0	41.0
Japan	84.1	91.2	92.9	94.8	101.0	102.0	103.0
Malaysia	3.4	3.4	3.3	3.4	3.4	3.5	3.5
Papua New Guinea .....	.2	1.2	1.8	2.8	3.0	3.2	3.5
Sri Lanka (Ceylon)	223.1	212.2	217.8	213.5	211.3	204.0	210.0
Taiwan	23.5	27.6	27.0	26.2	28.6	24.2	27.0
Turkey	23.9	33.4	33.6	46.5	43.2	44.9	45.0
USSR	56.0	66.8	68.6	71.3	74.8	75.0	77.0
Vietnam, South	5.0	5.5	5.8	5.1	6.3	5.0	5.0
Total	890.7	951.2	971.0	1,032.2	1,066.7	1,077.7	1,080.0
Africa:							
Burundi	---	.1	.3	.4	.6	.7	1.0
Cameroon .....	.8	1.2	1.2	1.4	1.5	1.6	1.7
Kenya	26.8	41.1	36.3	53.3	56.6	53.4	55.0
Malawi	15.6	18.7	18.6	20.7	23.6	23.3	25.0
Mauritius 2/.....	2.3	3.3	4.1	4.7	4.1	4.0	4.1
Mozambique	13.9	17.0	16.5	18.7	18.8	17.6	17.0
Rhodesia	2.5	3.0	3.0	3.0	3.0	3.0	3.0
Rwanda .....	.6	1.2	1.8	2.5	2.7	3.4	4.0
Tanzania	7.3	8.5	10.5	12.7	12.7	13.0	13.5
Uganda	12.7	18.2	18.0	23.4	20.4	21.7	20.0
Zaire	6.4	8.0	8.0	8.0	9.0	6.5	5.5
Total	88.9	120.3	118.3	148.8	153.0	148.2	149.8
South America:							
Argentina	16.5	18.5	25.0	24.0	23.1	26.0	29.0
Brazil	5.7	5.8	6.5	6.5	6.5	6.5	6.5
Ecuador	---	.3	.4	.5	.7	1.3	1.5
Peru	1.4	1.5	2.1	2.2	2.2	2.2	2.2
Total	23.6	26.1	34.0	33.2	32.5	36.0	39.2
Grand total	1,003.2	1,097.6	1,123.3	1,214.2	1,252.2	1,261.9	1,269.0

1/ Formerly East Pakistan. 2/ Year ending June 30.

1975/76 WORLD COFFEE PRODUCTION EQUALS CONSUMPTION NEEDS

Although favorable growing conditions have boosted coffee crops in several important producing countries, total production in 1975/76 will be about 9 percent lower than in 1974/75. The 1975/76 coffee harvest is expected to about 72.5 million bags, (132.3 lb.) with exportable production of 53 million bags. Exportable production, as considered in this report, represents total harvested production less domestic consumption in producing countries.

Total 1974/75 production has been revised upward by about 700,000 bags because of adjustments in a number of countries. Exportable production in 1974/75 is now carried at 60.4 million bags.

The severe frost that affected the major coffee areas in Brazil on July 17/18 will not affect 1975/76 production, but the 1976/77 Brazilian crop may be off by more than 50 percent.

There will be adequate coffee for world requirements in the 1975/76 marketing year (October-September), as Brazil and several other producing countries have sizable carryover stocks. However, a tighter world coffee situation is expected after September 1976.

COFFEE, GREEN: TOTAL PRODUCTION IN SPECIFIED COUNTRIES - AVERAGE 1966-67/1970-71, ANNUAL 1971-72/1975-76 ^{1/}
(IN THOUSANDS OF BAGS) ^{2/}

REGION AND COUNTRY	AVERAGE 1966-67/1970-71	1971-72	1972-73	1973-74	1974-75	1975-76
NORTH AMERICA:						
COSTA RICA	1,295	1,350	1,335	1,570	1,400	1,450
CUBA	475	460	475	500	450	450
DOMINICAN REPUBLIC	604	715	750	845	790	900
EL SALVADOR	2,186	2,600	2,100	2,070	2,850	2,300
GUADELOUPE	3	1	1	1	1	1
GUATEMALA	1,770	2,100	2,250	2,200	2,500	2,650
HAITI	492	575	525	550	535	535
HONDURAS	478	700	850	775	735	815
JAMAICA AND DEP.	19	24	22	30	20	20
MARTINIQUE	3	1	1	1	1	1
MEXICO	2,935	3,400	3,700	3,300	3,800	3,900
NICARAGUA	557	700	570	585	675	690
PANAMA	91	88	82	72	68	70
TRINIDAD-TOBAGO	61	49	50	30	52	60
US-HAWAII	36	21	22	19	18	18
US-PUERTO RICO	247	150	200	220	200	200
TOTAL	11,242	12,934	12,933	12,768	14,095	14,060
SOUTH AMERICA:						
BOLIVIA	124	95	95	95	90	90
BRAZIL	17,650	23,600	24,000	14,500	27,500	23,000
COLOMBIA	7,950	7,200	8,800	7,800	9,000	8,500
ECUADOR	1,022	1,100	1,100	870	1,175	820
GUYANA	17	10	12	10	10	10
PARAGUAY	43	50	50	50	42	40
PERU	909	1,030	1,030	1,000	900	900
SURINAM	6	3	3	3	3	3
VENEZUELA	827	950	1,100	960	735	1,050
TOTAL	28,548	34,036	36,190	25,268	39,455	34,413
AFRICA:						
ANGOLA	3,280	3,400	3,500	3,200	3,000	1,500
BURUNDI	284	400	355	350	450	400
CAMEROON	1,110	1,250	1,440	1,500	1,500	1,500
CAPE VERDE ISLANDS	2	1	1	1	1	1
CENT AFRICAN REP.	167	175	180	190	175	180
COMORO ISLANDS	3	2	2	2	2	2
CONGO, BRAZZAVILLE	15	14	14	10	10	10
DAHOMEY	17	15	15	13	14	14
EQUATORIAL GUINEA	128	115	115	105	120	100
ETHIOPIA	1,924	2,150	2,100	1,700	2,050	2,000
GABON	17	10	15	9	10	10
GHANA	85	80	80	45	45	45
GUINEA	164	100	125	105	115	105
IVORY COAST	3,740	4,475	5,050	3,285	4,500	4,300
KENYA	857	1,000	1,265	1,100	1,000	1,165
LIBERIA	70	70	85	65	75	75
MALAGASY REPUBLIC	999	965	1,000	1,000	1,200	1,200
NIGERIA	56	70	70	38	40	40
RWANDA	187	260	186	266	256	260
SAO TOME-PRINCIPE	5	2	2	2	2	2
SIERRA LEONE	91	95	135	67	133	107
TANZANIA	801	850	800	700	838	800
TOGO	193	200	200	180	200	195
UGANDA	2,967	2,850	3,300	3,100	3,000	3,000
ZAIRE (CONGO-K)	1,070	1,300	1,380	1,150	1,085	935
TOTAL	18,316	19,849	21,415	18,183	19,021	17,946
ASIA:						
INDIA	1,359	1,200	1,580	1,535	1,665	1,550
INDONESIA	2,110	2,250	2,700	2,750	2,900	2,700
MALAYSIA	106	63	65	67	70	70
PHILIPPINES	766	835	850	865	900	950
PORTUGUESE TIMOR	50	65	65	60	65	55
VIETNAM SOUTH	53	50	55	55	60	60
YEMEN	60	45	45	25	35	35
TOTAL	4,503	4,508	9,360	5,357	5,695	5,420
OCEANIA:						
NEW CALEDONIA	30	25	25	25	25	25
NEW GUINEA	338	480	560	588	633	680
NEW HEBRIDES	3	2	2	2	2	2
TOTAL	372	507	587	615	660	707
WORLD TOTAL	62,981	71,834	76,485	62,211	79,726	72,546

^{1/} Coffee marketing year begins about July in some countries and in others about October. ^{2/} Or 60 kilograms each. ^{3/} As indicated in footnote 1, the coffee marketing year begins in some countries as early as July. Ecuador is one of these countries. Hence, the crop harvested principally during June-October 1975 in that country is shown as production for the 1975-76 marketing year. In Ecuador, however, this is referred to as the 1974-75 crop.

Notes: Production estimates for some countries include cross-border movements.

Foreign Agricultural Service. Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U.S. Agricultural Attaches and Foreign Service Officers, results of office research, and related information.

COFFEE, GREEN: EXPORTABLE PRODUCTION IN SPECIFIED COUNTRIES - AVERAGE 1946-67/1970-71, ANNUAL 1971-72/1975-76 ^{1/}
(IN THOUSANDS OF BAGS) ^{2/}

REGION AND COUNTRY	AVERAGE 1946-67/1970-71	1971-72	1972-73	1973-74	1974-75	1975-76
NORTH AMERICA:						
COSTA RICA	1,150	1,190	1,160	1,400	1,225	1,268
CUBA	54	35	20	50	---	---
DOMINICAN REPUBLIC	495	490	490	600	537	639
EL SALVADOR	2,041	2,440	1,935	1,895	2,670	2,114
GUADELOUPE	3/	3/	3/	3/	3/	3/
GUATEMALA	1,536	1,845	1,990	1,925	2,217	2,359
HAITI	303	370	325	340	320	315
HONDURAS	379	575	720	635	595	668
JAMAICA	6	9	6	14	4	4
MARTINIQUE	---	---	---	---	---	---
MEXICO	1,501	1,835	2,100	1,690	2,056	2,095
NICARAGUA	494	615	480	496	583	595
PANAMA	17	23	20	---	---	---
TRINIDAD-TOBAGO	48	27	40	13	35	42
US-HAWAII	11	1	2	---	---	---
US-PUERTO RICO	3	---	---	---	---	---
TOTAL	7,968	9,455	9,288	9,058	10,242	10,099
SOUTH AMERICA:						
BOLIVIA	52	64	65	73	68	68
BRAZIL	9,299	14,850	15,000	6,370	19,135	15,000
COLOMBIA	6,618	5,750	7,430	6,250	7,400	6,850
ECUADOR ^{4/}	816	875	860	625	925	570
GUYANA	1	---	---	---	---	---
PARAGUAY	24	43	35	28	19	17
PERU	694	800	800	750	640	634
SURINAM	2	1	1	1	1	1
VENEZUELA	235	300	430	255	5	300
TOTAL	17,742	22,684	24,621	14,352	28,193	23,440
AFRICA:						
ANGOLA	3,204	3,300	3,400	3,095	2,895	3,394
BURUNDI	279	395	350	345	445	395
CAMEROON	1,081	1,220	1,410	1,473	1,473	1,472
CAPE VERDE ISLANDS	1	---	---	---	---	---
CENT AFRICAN REP.	161	165	170	179	164	169
COMORO ISLANDS	1	1	1	---	---	---
CONGO, BRAZZAVILLE	14	13	13	9	9	9
DAHOMY	15	14	14	12	13	13
EQUATORIAL GUINEA	119	110	110	100	115	95
ETHIOPIA	1,402	1,490	1,410	1,005	1,340	1,275
GABON	15	9	14	8	9	9
GHANA	76	67	67	31	31	30
GUINEA	154	95	120	100	109	49
IVORY COAST	3,685	4,400	4,985	3,219	4,432	4,230
KENYA	839	973	1,240	1,073	972	1,136
LIBERIA	67	65	80	60	69	69
MALAGASY REPUBLIC	894	835	865	865	1,060	1,058
NIGERIA	44	50	40	11	12	12
RWANDA	182	254	180	260	250	254
SAO TOME-PRINCE	3	1	1	---	---	---
SIERRA LEONE	83	90	130	62	128	102
TANZANIA	865	830	780	678	816	778
TOGO	189	197	197	177	197	192
UGANDA	2,952	2,830	3,280	3,078	2,978	2,978
ZAIRE (CONGO,K)	985	1,200	1,265	1,040	975	820
TOTAL	17,300	18,604	20,122	16,880	18,492	16,589
ASIA:						
INDIA	634	435	820	730	845	710
INDONESIA	1,518	1,320	1,650	1,795	1,925	1,705
MALAYSIA	---	---	---	---	---	---
PHILIPPINES	4	---	---	---	---	2
PORTUGUESE TIMOR	44	61	60	50	54	44
VIETNAM SOUTH	3/	3/	3/	3/	3/	3/
YEMEN	50	35	35	20	30	30
TOTAL	2,250	1,850	2,565	2,595	2,854	2,491
OCEANIA:						
NEW CALEDONIA	21	15	15	14	14	14
NEW GUINEA	325	474	554	584	629	675
NEW HEBRIDES	3	1	1	1	1	1
TOTAL	349	490	570	599	644	690
WORLD TOTAL	45,608	53,083	57,166	43,484	60,425	53,300

^{1/} Coffee marketing year begins about July in some countries and in others about October. Exportable production represents total harvested production minus estimated domestic consumption. ^{2/} Or 60 kilograms each. ^{3/} Negligible. ^{4/} As indicated in footnote 1, the coffee marketing year begins in some countries as early as July. Ecuador is one of these countries. Hence, the crop harvested principally during June-October 1975 in that country is shown as production for the 1975-76 marketing year. In Ecuador, however, this is referred to as the 1974-75 crop.

Note: Production estimates for some countries include cross-border movements.

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WORLD CATTLEHIDE PRODUCTION TURNED UPWARD IN 1974, CONTINUING UPWARD TREND EXPECTED IN 1975

World production of cattlehides in 1974 totaled 182.8 million pieces—up 5 percent from 1973 levels and nearly 7 percent above abnormally low 1972 output. Most of the gains over 1973 production occurred in North America and Western Europe. Cattle slaughter in these areas increased sharply in 1974 owing to unattractive cattle prices and declines in economic activity with attendant reduced demand for meat.

The most significant declines in cattlehide production occurred in Australia and South Africa but were more than offset by the increases in North American and West European production. In Australia producers reacted to lower manufacturing beef prices and the closure of the European Community and Japanese beef markets by withholding animals from slaughter, thus reducing cattlehide production as well as beef production.

In South Africa, good prices and favorable grazing conditions caused producers to rebuild herds. Imports of live cattle from neighboring countries, cut off from traditional EC markets also aided in encouraging herd rebuilding in South Africa.

Calf and kip skin production also increased in 1974 though the level attained was still well below that of the late 1960's. The largest increase over 1973 production was in the United States. Production of calf skins increased 18 percent to 4.8 million pieces. An upturn in calf slaughter in the last 5 months of the year because of high feed costs and inability of many cattlemen to carry additional calves through the winter were responsible for the increase in U.S. production.

For 1975, world cattlehide production is expected to continue the upward trend established in 1974 as producers in the United States, the European Community, and Argentina continue to cull their herds and slaughter lighter weight animals. In the EC-9, cattle slaughter is forecast to increase 3 percent in 1975, and calf slaughter, 6 percent. Argentine cattle slaughter in the first quarter of 1975 was 12 percent above that of the same 1974 period, and a further acceleration is expected during the rest of the year. In the first 7 months of 1975, cattle slaughter in the United States was 11 percent greater than during the same period of the previous year. Calf slaughter was up 89 percent.

BOVINE HIDES AND SKINS: PRODUCTION IN SPECIFIED COUNTRIES 1/- ANNUAL 1969-74

(IN UNITS OF 1,000 PEECES)

REGION AND COUNTRY	1964	1969	1970	1971	1972	1973	1974 2/
NORTH AMERICA							
CANADA.....	4,554	4,158	4,044	4,063	4,037	3,444	4,175
COSTA RICA.....	267	257	269	298	302	249	336
DOMINICAN REPUBLIC.....	144	144	170	175	204	214	219
EL SALVADOR.....	145	145	145	143	164	159	167
GUATEMALA.....	335	337	333	361	374	349	356
HONDURAS.....	137	202	208	264	272	414	345
MEXICO.....	3,146	1,359	3,599	1,499	1,569	3,760	4,944
NICARAGUA.....	253	208	310	325	344	340	267
PANAMA.....	151	164	173	149	202	145	197
UNITED STATES 3/.....	42,143	41,728	40,748	41,050	40,943	38,961	42,577
TOTAL.....	51,357	50,432	50,038	50,367	49,413	48,009	51,013
SOUTH AMERICA							
ARGENTINA 3/.....	13,431	14,787	13,694	14,464	11,056	10,911	11,230
BRAZIL.....	4,732	9,440	9,540	9,400	10,240	12,250	10,533
CHILE.....	464	642	671	564	407	378	380
COLOMBIA.....	2,167	2,478	2,625	2,688	2,671	2,400	2,137
ECUADOR.....	246	275	293	310	326	343	359
PARAGUAY.....	655	640	697	620	588	520	500
PERU.....	706	775	823	847	742	690	680
URUGUAY.....	1,340	1,104	1,485	1,189	1,252	1,120	1,171
VENEZUELA.....	1,049	1,161	1,195	1,272	1,256	1,633	1,520
TOTAL.....	29,422	31,292	31,244	27,454	29,540	30,057	28,477
EUROPE							
WESTERN							
ECI							
BELGIUM-LUXEMBOURG.....	1,071	1,063	1,093	1,124	1,046	1,021	1,153
DENMARK.....	1,249	1,157	1,123	1,041	881	869	1,123
FRANCE.....	9,724	9,183	9,099	7,972	7,040	6,724	7,978
GERMANY, WEST.....	5,545	5,464	5,690	5,710	4,891	4,801	5,434
IRELAND.....	572	869	554	576	510	500	1,530
ITALY.....	4,105	4,179	4,108	4,108	3,703	4,953	5,222
NETHERLANDS.....	1,742	1,729	1,945	1,930	1,691	1,721	1,940
UNITED KINGDOM.....	4,054	3,804	4,043	3,953	3,629	3,425	4,604
TOTAL EC.....	27,445	26,448	27,031	26,497	23,728	24,471	28,944
AUSTRIA.....	862	805	752	759	727	713	633
FINLAND.....	794	971	456	479	779	717	720
GREECE 3/.....	524	554	553	513	495	471	556
NORWAY.....	623	438	380	381	360	355	383
PORTUGAL.....	310	443	476	400	359	346	380
SPAIN.....	1,431	1,467	1,550	1,715	1,474	1,633	1,898
SWEDEN.....	804	831	824	719	609	610	724
SWITZERLAND.....	809	774	809	812	747	717	804
TOTAL WESTERN.....	33,427	32,771	33,330	32,984	29,273	30,133	35,224
EASTERN							
CZECHOSLOVAKIA.....	1,404	1,584	1,474	1,490	1,475	1,450	1,460
GERMANY, EAST.....	1,617	1,618	1,672	1,647	1,701	1,730	1,705
HUNGARY.....	644	670	623	612	602	618	618
POLAND.....	4,340	5,349	4,940	4,697	4,250	4,326	5,234
YUGOSLAVIA.....	2,274	2,146	1,883	1,954	1,717	1,884	2,003
TOTAL EASTERN.....	11,313	11,367	10,596	10,400	9,745	10,028	11,130
TOTAL EUROPE.....	44,740	44,138	43,926	43,383	39,018	40,161	46,354
U.S.S.R.....	40,724	38,527	35,625	36,700	34,538	34,938	39,000
AFRICA							
BOTSWANA.....	139	144	200	214	227	230	230
MALAWI.....	34	44	56	59	61	65	70
RHODESIA 3/.....	394	379	310	340	565	470	575
SOUTH AFRICA.....	2,174	2,391	2,503	2,632	2,925	2,911	2,353
SWAZILAND 3/.....	79	73	81	87	90	84	85
ZAMBIA.....	47	49	60	64	72	40	110
TOTAL.....	2,499	2,061	3,218	3,600	3,940	3,944	3,423
ASIA							
CHINA, REP. OF (TAIWAN).....	53	56	54	45	27	34	30
IRAN 3/.....	549	556	624	614	668	674	685
JAPAN.....	404	1,152	1,296	1,251	1,214	841	1,145
KOREA, REP. OF.....	213	214	284	274	219	261	312
PHILIPPINES 3/.....	510	525	515	530	505	625	620
THAILAND.....	335	336	347	342	354	320	320
TURKEY 3/.....	2,437	2,817	2,874	2,808	2,390	2,497	2,600
VIETNAM, SOUTH.....	44	115	113	120	106	100	100
TOTAL.....	4,949	5,775	6,106	6,641	6,473	6,363	6,612
OCEANIA							
AUSTRALIA.....	5,474	4,821	5,728	4,992	7,384	8,447	4,741
NEW ZEALAND.....	2,753	3,130	3,066	2,814	2,901	3,034	2,217
TOTAL.....	8,227	7,951	8,794	7,806	10,285	11,481	6,958
TOTAL SELECTED COUNTRIES	162,362	142,896	174,951	176,201	171,209	174,347	142,837

* - FAS ESTIMATES

1/ ESTIMATED FROM CATTLE AND CALF SLAUGHTER.

2/ PRELIMINARY.

3/ INCLUDES AN ESTIMATE FOR DEATH LOSSES.

4/ EXCLUDES ALASKA AND HAWAII PRIOR TO 1973.

5/ INCLUDES BUFFALOES.

FOREIGN AGRICULTURAL SERVICE. PREPARED OR ESTIMATED ON THE BASIS OF OFFICIAL STATISTICS OF FOREIGN GOVERNMENTS, OTHER FOREIGN SOURCE MATERIALS, REPORTS OF U.S. AGRICULTURAL ATTACHES AND FOREIGN SERVICE OFFICERS, RESULTS OF OFFICE RESEARCH AND RELATED INFORMATION.

CALF AND KIP SKIN: PRODUCTION IN SPECIFIED COUNTRIES 1/- ANNUAL 1963-74

(IN UNITS OF 1,000 PIECES)

REGION AND COUNTRY	1963	1964	1965	1966	1967	1968	1969	1970
NORTH AMERICA:								
CANADA.....	1,001	994	957	838	865	842	850	850
UNITED STATES.....	5,241	5,409	4,639	4,293	3,854	3,529	3,172	3,172
TOTAL.....	7,244	6,403	5,596	5,131	4,699	4,371	4,022	4,022
SOUTH AMERICA:								
ARGENTINA.....	4,944	4,611	4,753	2,944	2,504	2,246	2,525	2,525
BRAZIL.....	243	224	215	231	240	251	260	260
URUGUAY.....	95	97	145	114	44	71	57	57
TOTAL.....	5,282	4,932	5,113	3,289	2,748	2,568	2,842	2,842
EUROPE:								
WESTERN:								
EC:								
BELGIUM-LUXEMBOURG.....	211	279	284	287	269	224	244	244
DENMARK.....	700	700	751	664	498	590	540	540
FRANCE.....	4,757	4,376	4,136	3,911	3,457	3,152	2,865	2,865
GERMANY, WEST.....	1,377	1,211	1,057	1,044	886	739	808	808
ITALY.....	1,110	1,254	1,287	1,238	1,013	1,050	988	988
NETHERLANDS.....	914	923	1,035	1,035	983	1,010	950	950
UNITED KINGDOM.....	677	426	360	260	160	140	430	430
TOTAL EC.....	9,644	9,183	8,953	8,426	7,264	6,930	7,325	7,325
PORTUGAL.....	112	94	95	54	52	46	53	53
SPAIN.....	734	720	562	668	667	307	594	594
SWEDEN.....	137	160	176	160	104	110	126	126
SWITZERLAND.....	472	440	447	459	392	349	392	392
TOTAL WESTERN.....	11,219	10,671	10,397	9,721	8,779	7,992	8,490	8,490
EASTERN:								
CZECHOSLOVAKIA.....	600	473	424	420	398	394	402	402
HUNGARY.....	46	44	33	32	30	30	31	31
POLAND.....	2,377	2,578	2,070	2,141	1,833	1,795	2,095	2,095
YUGOSLAVIA.....	1,045	866	721	751	633	655	696	696
TOTAL EASTERN.....	4,068	3,971	3,250	3,344	2,954	2,874	3,224	3,224
TOTAL EUROPE.....	15,287	14,642	13,647	13,065	11,733	10,866	11,714	11,714
AFRICA:								
SOUTH AFRICA.....	234	228	248	227	233	141	116	116
ASIA:								
JAPAN.....	110	329	317	274	127	34	175	175
TURKEY.....	921	1,127	1,225	993	964	1,063	1,060	1,060
OCEANIA:								
AUSTRALIA.....	1,179	1,214	1,013	1,050	1,281	1,257	1,147	1,147
NEW ZEALAND.....	1,259	1,345	1,239	1,143	1,060	1,056	1,300	1,300
TOTAL.....	2,438	2,559	2,252	2,193	2,341	2,313	2,447	2,447
TOTAL SELECTED COUNTRIES	31,517	30,564	28,218	25,921	22,130	21,099	23,096	23,096

1/ ESTIMATED FROM CATTLE SLAUGHTER.
2/ PRELIMINARY.

FOREIGN AGRICULTURAL SERVICE. PREPARED OR ESTIMATED ON THE BASIS OF OFFICIAL STATISTICS OF FOREIGN GOVERNMENTS, OTHER FOREIGN SOURCE MATERIALS, REPORTS OF U.S. AGRICULTURAL ATTACHES AND FOREIGN SERVICE OFFICERS, RESULTS OF OFFICE RESEARCH AND RELATED INFORMATION.

1975 WORLD ALMOND CROP SEEN SMALLER THAN 1974'S, BUT STILL A NEAR-RECORD

The 1975 world almond crop, estimated at 160,000 metric tons (kernel weight basis) is the second largest on record. This year's harvest is 13 percent less than the record 1974 crop of 183,800 tons, but 20 percent more than the 1973 output and 26 percent above the 5-year average, 1966-70. With expectations of a relatively large 1975 almond crop following the 1974 record crop, prices receded substantially from year-earlier levels. However, the outlook for almonds is fair to good.

Foreign production is up slightly over that of a year ago, totaling 85,000 tons, compared with 83,900 tons in 1974 and 65,600 tons in 1973. This small increase is due almost entirely to a substantially higher, but still less-than-normal harvest in Italy. Production in Iran is also expected to increase, while decreases are estimated in Portugal and Spain. There was no improvement in the almond harvest in Morocco.

The Italian almond crop, plagued by severe weather problems for the past 4 years, is now placed at 26,000 tons, up 86 percent over the 1974 level. While the volume represents a substantial increase over last year's estimates, it still is slightly less than the 10-year (1964-73) average of 29,000 tons. The 1975 estimate represents the fifth consecutive below-average almond harvest for Italy. The Portuguese almond crop, battered by severe winds during blossoming, is now estimated at 3,500 tons, 22 percent less than the 1974 crop of 4,400 tons. The almond output in Morocco is expected to total 3,000 tons, while the Iranian crop is estimated to rise to 9,000 tons, 22 percent over the 1974 crop of 7,400 tons. The crop in Spain, suffering from a normal reduced yield after the 1974 large crop, is estimated at 43,500 tons, 21 percent less than a year ago.

The official estimate for the 1975 U.S. almond harvest is 75,000 tons (shelled basis), 25 percent less than the record 1974 output of 99,900 tons but the second largest on record.

Exports for the 1974-75 marketing year from the major producing countries (Iran, Italy, Morocco, Portugal, Spain, and the United States) are placed at 77,000 tons (kernel weight basis), up 8 percent from the total shipped during 1973/74.

U.S. exports for 1974-75 increased substantially, reacting to the near-end-of-season surge in demand for nuts and the reluctance of other major producers to export at current prices. U.S. shipments for 1974-75 amounted to 45,000 tons, 39 percent over the level achieved last year. These figures only included almonds reported by the Bureau of Census in the "Almonds, Shelled" and the "Almonds, Not Shelled" categories. A large and increasing volume of almonds is being exported as blanched, roasted, salted, or in mixes, and is reported with other nut products in a basket category.

Prices during the 1974-75 marketing year receded somewhat from year-earlier levels, reflecting consumer substitution for lower priced nuts during the early part of the season coupled with the large 1974-75 carry-in stocks and the prospects of a large 1975 harvest. With a large 1975 crop, prices are not expected to rise significantly nor are they likely to decrease by any measurable amount. This mixed and uncertain picture results primarily from foreign producers' efforts to hold out for higher prices. Currently, prices remain relatively firm but somewhat lower than year-earlier levels.

Spanish unselected valencias were quoted at \$1.16 per pound (f.o.b. Spanish port) in January 1975 and \$1.05 per pound in July 1975. This compares with \$1.72 in January 1974 and \$1.43 in July 1974.

Bari shelled unselected were quoted at \$1.22 per pound (f.o.b. Italian port) in January 1975, compared with \$1.69 per pound a year ago. As of July 1975, Bari sold for \$1.08 per pound, compared with \$1.40 per pound during July 1974.

ALMONDS, SHELLLED: Commercial production in specified countries
Average 1966-70, Annual 1972-75

(In thousands of metric tons 1/)

Region and Country	Average 1966-70	1972	1973	1974 2/	1975 3/
Foreign:					
Iran	5.8	9.0	7.1	7.4	9.0
Italy	35.0	15.0	8.0	14.0	26.0
Morocco	3.6	4.8	5.5	3.0	3.0
Portugal	3.9	5.5	8.0	4.5	3.5
Spain	31.1	50.0	37.0	55.0	43.5
Total	79.4	84.3	65.6	83.9	85.0
United States	4/47.8	4/64.4	4/67.7	4/99.9	75.0
World total	127.2	148.7	133.3	183.8	160.0

1/ All tonnages have been converted to metric units; 1 metric ton is equivalent to 2204.6 pounds.

2/ Revised.

3/ Preliminary

4/ SOURCE: Almond Control Board

ALMONDS, SHELLLED BASIS: Exports from selected countries
1970-74 marketing year 1/

(In thousands of metric tons 2/)

Country	1970	1971	1972	1973	1974 3/
Foreign:					
Iran	5.8	5.4	5.6	5.5	3.0
Italy	17.7	13.2	9.6	3.3	3.0
Morocco	2.0	1.5	3.6	4.3	2.0
Portugal	5.0	5.2	4.5	6.6	4.0
Spain	16.5	19.0	33.0	19.0	20.0
Total	47.0	44.3	56.3	38.7	32.0
United States	25.9	35.7	26.2	32.3	45.0
World total	72.9	80.0	82.5	71.0	77.0

1/ Iran--year beginning September 23; Morocco--year beginning July 1; Spain, Portugal, and Italy--year beginning September 1; U.S.--year beginning August 1.

2/ All tonnages have been converted to metric units; 1 metric ton is equivalent to 2204.6 pounds.

3/ Preliminary.

ALMONDS, SHELLED, UNSELECTED: Monthly average prices, f.o.b.
Bari, Italy, marketing seasons 1970-76

(In U.S. cents per pound)

Month	1970-71	1971-72	1972-73	1973-74	1974-75	1975-76
August	87.6	97.5	107.6	177.0	138.5	103.6
September	77.6	93.8	105.7	181.3	135.8	
October	74.0	93.9	102.6	176.4	129.5	
November	73.4	89.9	101.7	170.1	126.3	
December	70.8	90.9	102.1	172.9	119.5	
January	69.4	96.8	104.1	169.4	122.1	
February	69.1	96.3	105.7	165.9	120.0	
March	72.9	95.4	118.3	166.8	117.4	
April	73.1	97.9	142.4	157.1	112.9	
May	80.8	102.0	167.3	156.1	112.3	
June	79.1	107.9	173.5	142.6	110.2	
July	85.2	107.8	176.0	139.5	108.2	

RECORD 1975 WORLD FILBERT CROP

Revised estimates indicate a record world filbert crop of 409,000 metric tons (in-shell basis) in 1975, exceeding last year's record harvest of 382,100 tons by 7 percent and the 1970 record by 14 percent.

Foreign production previously forecast at 340,000 tons is now estimated at a record 397,000 tons, 6 percent above the 1974 record harvest. Prices during the 1974-75 season increased moderately in response to consumer preference for lower priced filberts over higher priced almonds and other nuts.

The Turkish trade anticipates an unusually large 1975 harvest, now estimated at 300,000 tons, substantially above any previously recorded crops. This year's estimate is 25 percent above both the 1973 and 1974 record outputs of 240,000 tons. This year is the fourth consecutive year that Turkish producers have exceeded or equalled their previous year's output. This development is particularly noteworthy in that the Turkish production cycle has traditionally been characterized by year-to-year fluctuations. The past 4 years seem to indicate that Turkish producers have either employed improved production techniques or have had continue favorable weather or a combination of both. In any event, if the current rate of production continues, the least that can be said is that there will be a surplus of filberts on the world market, with subsequent low prices. World filbert output has increased 49 percent since 1971. The majority of this increase is attributed to sustained high production levels in Turkey.

The Italian crop is now estimated at 75,000 tons, about 28,000 tons less than last year's record output and 10,000 tons below the 1974 record harvest. Spain's 1975 crop estimate is placed at 22,000 tons down 34 percent from last year's large harvest of 33,000 tons, but still 42 percent above the low crop of 1973. Production in the United States is estimated at 12,000 tons, almost double the 1974 output of 6,100 tons.

Exports from the three primary producing countries (Italy, Spain, and Turkey) are placed at 271,000 tons (in-shell basis) for the 1974-75 season. This represents a 12 percent decline from a year earlier. Turkish shipments are estimated 180,000 tons (compared with 250,200 tons during 1973-74), while Spain's overseas sales are placed at 20,000 tons (compared with 9,600 tons last season). Italian exports are estimated at a record 71,000 tons, substantially above last season's shipments of 47,300 tons and 12 percent above the previous 1971 record of 63,200 tons. Italy's improved export performance is attributed to attractive prices and additional buyers in the market for Italian filberts, particularly buyers from the Arab countries.

U.S. imports of shelled filberts during the first 10 months of the 1974-75 season totaled 2,581 tons (in-shell basis), down 76 percent from the year-earlier level of 10,916 tons. Virtually all imports originated from Turkey during the two seasons. The decrease in imports is due primarily as a result of the expected large U.S. filbert crop in 1975. U.S. imports for the entire 1973-74 year amounted to 11,743 tons.

Throughout most of the 1974-75 season, foreign prices fluctuated slightly, peaking during June and moderately receding thereafter. However, compared with last year, the price picture is at best mixed, but generally above year-earlier levels. For example, Italian in-shell avellinos were selling for an average of 33 cents per pound (f.o.b. Italian port) in August 1975, 36 cents a pound in June and 35 cents in January 1975. This compares with 36 cents, and 29 cents respectively, for the same periods a year ago. On the other hand, shelled avellinos were quoted at 81 cents per pound in August 1975, compared with 94 cents a year earlier. In June 1975; they sold for 87 cents and a year ago, 97 cents. Shelled Turkish Kerassundes prices are presented in the accompanying table.

FILBERTS, IN-SHELL: Production in specified countries,
annual 1971-75

(In thousands of metric tons 1/)

Region and Country	1971	1972	1973	1974	1975 2/
Foreign:					
Italy	95.0	75.0	85.0	103.0	75.0
Spain	20.0	20.0	15.5	33.0	22.0
Turkey	150.0	190.0	240.0	240.0	300.0
Total	265.0	285.0	340.5	376.0	397.0
United States	10.3	9.2	11.1	6.1	12.0
Total world	275.3	294.2	351.6	382.1	409.0

1/ All tonnages have been converted to metric units; 1 metric ton is equivalent to 2204.6 pounds

2/ Preliminary.

FILBERTS: Exports from selected countries,
1970-74 marketing year 1/

(In thousands of metric tons 2/)

Type and Country	1970	1971	1972	1973	1974 3/
In-Shell:					
Italy	14.0	17.0	18.0	16.5	4/
Spain	4/	4/	4/	4/	4/
Turkey	4.0	3.0	3.0	1.8	4/
Total	---	---	---	---	---
Shelled:					
Italy	18.5	21.0	14.7	13.9	4/
Spain	4/	4/	4/	4/	4/
Turkey	67.0	72.0	91.0	124.2	4/
Total	---	---	---	---	---
In-Shell Equivalent:					
Italy	55.4	63.2	51.0	47.3	71.0
Spain	13.0	15.0	15.0	9.6	20.0
Turkey	138.4	145.2	185.4	250.2	180.0
Total	206.8	223.4	251.4	307.1	271.0

1/ Marketing year begins September 1.

2/ All tonnages have been converted to metric units; 1 metric ton is equivalent to 2204.6 pounds.

3/ Preliminary.

4/ Separation into shelled and in-shell not available.

FILBERTS, SHELLLED KERASSUNDES: Prices, f.o.b. Turkish port,
first week of each month, 1970-75 marketing years ^{1/}

(In U.S. cents per pound)

First week of	1970-71	1971-72	1972-73	1973-74	1974-75
September	59.9	58.2	54.4	61.2	78.0
October	63.7	63.1	---	61.2	83.5
November	64.8	56.1	57.2	61.2	88.9
December	62.3	56.1	57.2	60.3	87.1
January	57.2	58.5	58.1	60.8	89.4
February	57.2	59.0	58.1	62.1	88.9
March	56.6	58.5	57.2	62.1	88.5
April	56.1	57.1	59.0	64.4	88.8
May	57.2	59.0	57.6	64.0	89.8
June	60.4	---	58.5	67.1	81.2
July	---	54.4	59.4	69.4	
August	58.2	54.4	56.3	66.2	

^{1/} Starting in January 1972 prices are monthly averages, f.o.b. Turkish port.

NORTHERN HEMISPHERE APPLE CROP LARGER, PEAR CROP DOWN

Apples: The 1975 crop in the Northern Hemisphere is estimated at 12.5 million metric tons, 11 percent above that of a year earlier but 2 percent below the record large output of 1973.

Production in Western Europe during 1975 is expected to be nearly 11 percent above 1974's level but is 9 percent below the alltime high in 1973. Crops in the two key exporting countries, France and Italy, are up 19 percent and 8 percent, respectively, from those of a year ago. Production in West Germany, a key importing country, is up nearly a third over last year's short harvest but still well below the previous "on" year of 1973. West Germany's output has long demonstrated rather strong alternate bearing characteristics. In the United Kingdom, once a prominent market for U.S. apples, the 1975 crop is fractionally below the relatively small harvest of 1974.

Apple production in North America during 1975 is expected to be about 12 percent larger than that of a year ago. This reflects the record large commercial crop

anticipated in the United States. The U.S. crop for 1975 is forecast at 3.3 million metric tons, about 365,000 tons above last year's output.

Pears: Preliminary estimates place the Northern Hemisphere pear crop for 1975 at 3.7 million metric tons, 8 percent below that of 1974's and 12 percent smaller than the output of 1973.

The smaller crop is largely a reflection of the downturn in production in Western Europe, where many areas were affected by unfavorable weather during the bloom. The European crop, estimated at 2.9 million metric tons, is 11 percent smaller than last year's. Italy, by far the largest Northern Hemisphere producer, is expecting a crop of 1.4 million metric tons, about 6 percent below that of 1974. The crop in the United Kingdom, a highly important pear market, is exceptionally short, 47 percent smaller than that of 1974.

In the United States, production is forecast at 672,000 metric tons—3,000 tons above last year's average crop.

APPLES: Production of dessert and cooking varieties
in specified Northern Hemisphere countries,
annually 1971-75 1/

(In 1,000 Metric Tons)

Continent and Country	1971	1972	1973	1974	1975 ^{2/}
North America:					
Canada ^{3/}	398	393	380	412	432
Mexico	162	161	190	213	248
United States ^{3/} ..	2,890	2,668	2,830	2,945	3,310
Total	3,450	3,222	3,400	3,570	3,990
Europe					
EC:					
Belgium-Lux.	280	265	246	209	216
Denmark ^{3/}	80	64	80	72	80
France ^{4/}	1,854	1,719	2,060	1,619	1,920
Germany, West	1,980	1,239	2,016	1,281	1,678
Italy	1,698	1,873	2,050	1,886	2,030
Netherlands	520	400	460	385	400
United Kingdom ^{4/} ..	466	350	456	340	335
Total	6,878	5,910	7,368	5,792	6,659
Other Europe:					
Austria ^{4/}	158	112	187	205	215
Greece	225	183	233	200	251
Norway	51	50	36	59	44
Spain ^{4/}	571	738	1,015	992	900
Sweden ^{3/}	43	46	42	34	42
Switzerland ^{4/} ...	111	95	112	78	115
Yugoslavia	327	309	448	370	330
Total	1,486	1,533	2,073	1,938	1,897
Total Europe	8,364	7,443	9,441	7,730	8,556
Total Specified Co. .	11,814	10,665	12,841	11,300	12,546

^{1/} May include some cider varieties in countries not reporting separately.

^{2/} Preliminary.

^{3/} Commercial crop.

^{4/} Excludes cider apples reported separately.

Foreign Agricultural Service. Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U.S. Agricultural Attaches and Foreign Service Officers, results of office research, and related information.

PEARS: Production of dessert and cooking varieties
in specified Northern Hemisphere countries,
annually 1971-75 1/

(In 1,000 Metric Tons)

Continent and Country	1971	1972	1973	1974	1975 ^{2/}
North America:					
Canada ^{3/}	43	41	31	36	37
Mexico	34	35	36	40	47
United States ^{3/} ...	680	555	661	669	672
Total	757	631	728	745	756
Europe					
EC:					
Belgium-Lux.	60	51	30	89	34
Denmark ^{3/}	7	8	7	9	8
France ^{4/}	553	439	492	426	403
Germany, West	414	344	414	332	314
Italy	1,706	1,536	1,570	1,507	1,420
Netherlands	110	95	55	130	45
United Kingdom ^{4/} ..	66	49	44	51	27
Total	2,916	2,522	2,612	2,544	2,251
Other Europe:					
Austria ^{4/}	48	30	54	51	55
Greece	104	114	121	88	112
Norway	8	13	5	13	9
Spain ^{4/}	401	460	470	452	350
Sweden ^{3/}	7	6	4	5	4
Switzerland ^{4/} ...	23	13	26	10	30
Yugoslavia	112	91	141	93	100
Total	703	727	821	712	660
Total Europe	3,619	3,249	3,433	3,256	2,911
Total Specified Co. .	4,376	3,880	4,161	4,001	3,667

^{1/} May include some cider varieties in countries not reporting separately.

^{2/} Preliminary.

^{3/} Commercial crop.

^{4/} Excludes cider pears reported separately.

Foreign Agricultural Service. Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U.S. Agricultural Attaches and Foreign Service Officers, results of office research, and related information.

WORLD FISHMEAL AND OIL PRODUCTION AND EXPORTS CONTINUE RECOVERY

Table was omitted from the August Summary.

World fishmeal production in 1975 is forecast at 4.49 million metric tons, up 190,000 tons from the 1974 volume. Six major producer-exporters—Peru, Norway, South Africa, Chile, Denmark, and Iceland—are expected to produce 3.3 million tons this year (up 185,000 tons from last year), accounting for 51 percent of the world total. Between 1971 and 1974, these countries represented an average of 64 percent of the world total. The decline is largely attributable to a lower Peruvian anchovy catch, caused by a decline in anchovy population that resulted mainly from a sharp change in the Peruvian current. However, the Peruvian fish catch situation has since improved.

Peru is the principal producer of fishmeal among these countries. The total fish catch for 1975 is forecast at 5.1 million tons, the highest since 1971. Assuming a 22 percent extraction rate, 1975 fishmeal production is forecast at 1.12 million tons. With an estimated stock carryover from 1974 of nearly 220,000 tons, the total supply for 1975 will estimate 1.32 million tons.

Peruvian fish catch through mid-June totaled 2.95 million tons, which is equivalent to 650,000 tons of fishmeal. Peru has suspended commercial anchovy fishing in September or October.

Norway's fishmeal production is expected to decline to 1.0 million tons in 1975, 9 percent below that of 1974, and 21 percent below that of 1973. With international catch quotas now in effect for capelin (a member of the smelt family) and North Sea herring and national regulations applied, it is likely that Norway's fishmeal production will continue to decline.

South African production (including South West Africa) is forecast at 290,000 tons, the same as last year. South African output of fishmeal rose to 200,000 tons this year, 10 percent above 1974 production. Chile's record year was 1974 when 263,000 tons were produced. Chile's 1973 production of only 73,000 tons was the lowest since 1961.

Denmark's production of fishmeal in 1975 is forecast at 1.0 million tons, the same as in 1974 but 35 percent above that of 1973. Even though Denmark's production has been declining, in the long run it will probably face the problem of limited-catch provisions, as does Norway.

Iceland's fishmeal production for 1975 is forecast at 1.0 million tons, slightly below 1974's level but the same as in 1973. A recent development in the Icelandic fishmeal industry has been the diversion of some capelin from being used for fishmeal to the frozen fish export market for human consumption.

Countries other than the six major producer-exporters are forecast to produce 2.19 million tons in 1975—almost the same as last year.

In 1976, world fishmeal production is projected to reach 4.69 million tons—260,000 tons above the 1975 forecast. Peru represents 85 percent of this increase, with its 1976 production projected at 1.32 million tons. It is possible that

Peru's production could even be higher, but this will depend on the price of fishmeal vs. costs of production. Including projected stocks of 200,000 tons, Peru's 1976 supply could total 1.52 million tons.

World exports of fishmeal in 1975 are forecast at 2.28 million tons—390,000 tons above 1974's exports. Peru represents 94 percent of this increase, with its 1975 exports forecast at 1 million tons—almost 370,000 tons above those of 1974 and 650,000 tons above those of 1973. In 1976, world exports are projected to reach 2.48 million tons—200,000 tons above 1975's forecast. Peru will represent all of the increase in this trade, with its 1976 exports projected at 1.2 million tons.

Several of the major importers of fishmeal also export the product. West Germany, for example, imported 352,000 tons of fishmeal in 1974 and exported 92,000 tons. France imported 37,000 tons that year and exported 16,000 tons. Japan imported 25,000 tons and exported 31,000 tons. Japan is also a producer of fishmeal.

Fish Oil Output and Trade Up

World production of fish oil in 1975 is forecast at 1.1 million metric tons, representing an increase of 11 percent or 127,000 tons above 1974's output. The five principal producer-exporters—Peru, Norway, United States, South Africa, and Iceland—are forecast to produce 61 percent of the total 1975 fish oil output and all of the increase from the previous year.

Peru in 1975 is the largest fish oil producer, with output forecast at 325,000 tons—113,000 tons above that of last year. This year's assumed oil extraction rate is between 6 and 6.5 percent—the highest on record. Stocks on January 1, 1975, totaled 75,000 tons. Thus the total 1975 supply is 400,000 tons, compared with 221,000 tons in 1974.

Norway's 1975 production is forecast at 143,000 tons—14,000 tons below 1974's output and 49,000 tons below 1973's output. Lower quotas for capelin are partly responsible for this decline.

Fish oil production in the United States for 1975 is forecast at 108,000 tons, the same as last year.

South African fish oil production in 1975 is forecast at 60,000 tons—18 percent above that of last year. This is the highest production since 1970.

Icelandic production of fish oil for 1975 is forecast at 30,000 tons, which is approximately the same as in the previous 2 years and the highest since 1967.

Production in the countries other than the major producer-exporters for 1975 will be slightly above 1974's output. Their total production for 1975 is forecast at 451,000 tons—16,000 tons below that of last year.

World production of fish oil in 1976 is projected at 1.16 million tons—only 40,000 tons above 1975's forecast, with Peru again supplying most of the increase. Peru's 1976 fish

oil production is projected at 350,000 tons—25,000 tons above 1975's forecast.

World exports of fish oil in 1975 are forecast to total 620,000 tons, up 26 percent or 129,000 tons from the low level of 491,000 tons in 1974. The increase largely reflects recovery in Peruvian exports to 175,000 tons—almost 100,000 tons above last year's exports. Fish oil exports in 1974 were the lowest since 1965. Norway's 1975 net exports are forecast at 100,000—18,000 tons above those of last year. Together, Peru and Norway account for 91 percent of the increase in world exports of fish oil for 1975. In 1976, world exports are projected to increase to 695,000

tons—75,000 tons above 1975's forecast. Peru will account for all of the increase in 1976 world exports. Peru's exports for 1976 are projected at 250,000 tons.

The major importer of fish oil is the United Kingdom, whose 1974 imports totaled 154,000 tons. Previously, this country imported as much as 265,000 tons. The United Kingdom also exports fish oil, but in very small quantities (7,000-9,000 tons). The next largest importer is West Germany, which imported 133,000 tons in 1974. Norway is a major producer-exporter, but also is a major importer. In 1974 Norway exported 129,000 tons, while importing 47,000 tons.

FISHMEAL 1/ PRODUCTION IN SPECIFIED COUNTRIES, annual 1966-1975
(In 1,000 metric tons)

CONTINENT AND COUNTRY	1966	1967	1968	1969	1970	1971	1972	1973	1974 2/	1975 2/
NORTH AMERICA:										
CANADA	87	89	122	127	112	91	73	49	53	45
MEXICO	10	10	11	15	15	17	17	20	20	25
UNITED STATES	240	225	245	265	295	307	310	316	325	325
OTHER	14	14	10	5	8	12	10	15	15	15
TOTAL	351	338	389	412	430	427	410	400	413	410
SOUTH AMERICA:										
ARGENTINA	22	27	19	16	13	13	14	28	28	28
CHILE	218	162	235	177	197	263	116	73	176	200
PERU	1,471	1,816	1,922	1,611	2,253	1,935	897	423	905	1,100
OTHER	10	13	14	26	29	37	33	29	29	29
TOTAL	1,721	2,018	2,189	1,830	2,492	2,248	1,060	563	1,138	1,357
EUROPE:										
DENMARK	125	176	244	247	245	248	257	245	330	330
FRANCE	14	13	14	14	19	25	20	16	16	16
GERMANY, WEST	79	84	82	78	72	73	55	62	62	62
ICELAND	176	112	53	61	67	64	75	100	105	105
NETHERLANDS	10	8	5	7	8	7	7	7	7	7
NORWAY	422	494	404	310	382	370	357	351	309	280
POLAND	20	21	25	29	32	72	41	50	50	50
PORTUGAL	11	7	7	11	14	15	15	15	15	15
SPAIN	34	33	37	43	45	40	28	32	31	31
SWEDEN	7	7	8	8	9	9	10	12	12	12
UNITED KINGDOM	87	81	88	85	84	90	87	83	83	83
OTHER	15	18	19	20	24	27	23	30	30	30
TOTAL	999	1,054	986	914	971	1,040	975	1,006	1,050	1,021
USSR	265	325	348	374	395	427	456	506	480	480
AFRICA:										
ANGOLA	48	42	55	90	67	52	129	96	63	65
MOROCCO	37	25	38	28	30	20	30	38	33	33
SOUTH AFRICA 1/	270	356	478	412	340	280	231	279	290	290
OTHER	1	2	2	2	2	2	1	1	1	1
TOTAL	357	424	573	531	439	354	411	414	387	389
ASIA:										
AUSTRALIA	1	1	1	4	6	6	7	6	6	6
JAPAN	356	409	484	579	655	676	726	779	815	815
OTHER	9	9	11	12	12	11	11	11	11	11
TOTAL	366	420	495	595	673	693	744	796	832	832
WORLD TOTAL	4,058	4,579	4,980	4,655	5,399	5,189	4,056	3,675	4,300	4,489

Includes fish solubles, dry weight basis, where separately classified.
Preliminary.

Forecast.

Includes South West Africa and production from factory ships.

Note: Data computed from unrounded figures.

FOREIGN AGRICULTURE CIRCULARS

Cotton

U.S. Raw Cotton Exports in June Were Below Year-Earlier Level FC 13-75

Livestock and Meat

Consumption of Pork and Poultry Products Outpaced Forage-Based Products, 1961-73 in France, Italy, West Germany, United Kingdom, and Japan (FLM 7-75)

Oilseeds and products

Brazil's 1975 Soybean Crop and Trade Significantly Ahead of 1974 Levels (FOP 6075)

World's 1975 Fats and Oils Output is Estimated at 46 Million Tons (FOP 7-75)

Tobacco

World Trade in Unmanufactured Tobacco Set a New Record in Calendar 1974 (FT 3-75)

Seeds, field and vegetable

Exports of U.S. Seeds in 1974-75 Valued at Record \$113 Million (FFVS 4-75)

Sugar

World Sugar and Molasses Production Lower in 1974-75 Than in 1973-74 (FS 2-75)